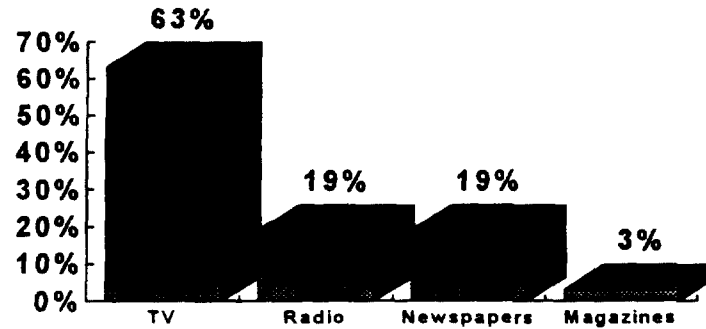


SOURCE FOR EMERGENCY INFORMATION

Americans depend on television for information. They cite television as their most likely source of information during an emergency.

Most Likely Source of Emergency Disaster Information

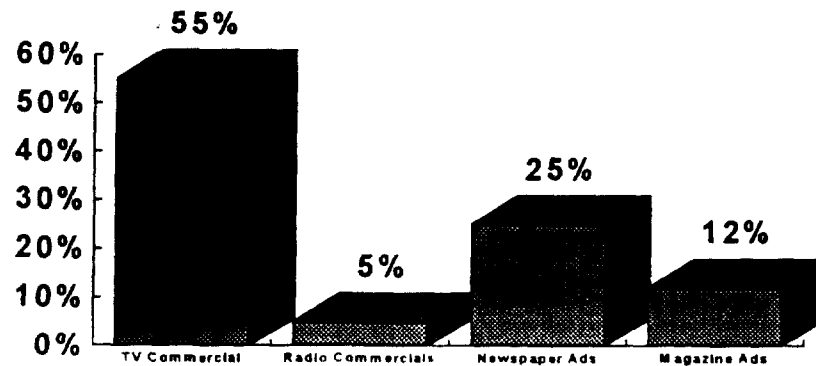


Source: 1995 Roper Study. Multiple Responses Permitted.

PRODUCT INFORMATION SOURCE

Of particular relevance to advertisers is the fact that when asked about advertising sources from which they are most likely to learn about products or brands, over half the public cite television commercials.

Most Likely Source for Product Information

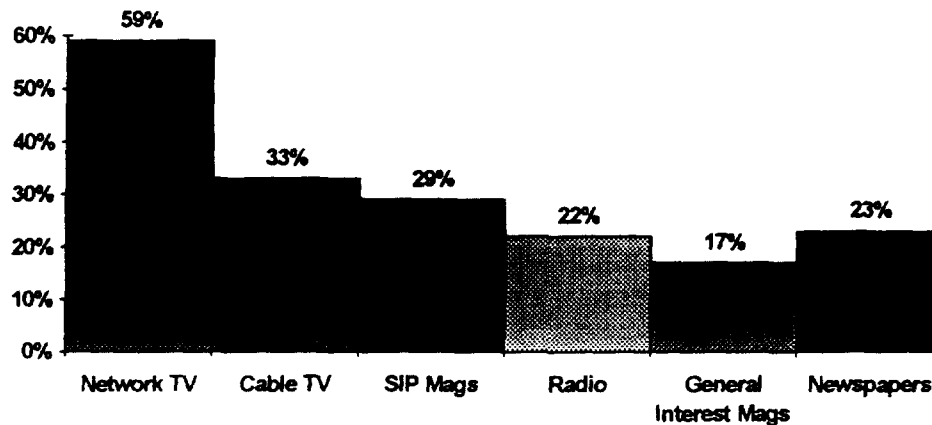


Source: 1995 Roper Study. Multiple Responses Permitted.

MOST EFFECTIVE MEDIA

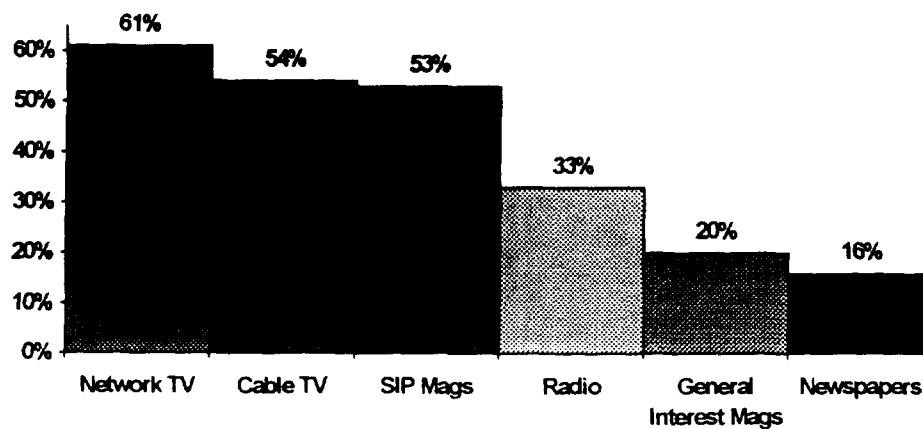
When comparing venues, advertisers deem network television the most effective at influencing trade groups and consumers.

Effectiveness in Influencing Trade Relationships



Source: 1991 Survey on Marketing Effectiveness & Media Value. Myers Marketing & Research. Multiple responses permitted.

Effectiveness in Influencing Consumer Motivations



Source: 1991 Survey on Marketing Effectiveness & Media Value. Myers Marketing & Research. Multiple responses permitted.

Current Viewership Dynamics

"It has become clear that the nets retain the unmatched ability to deliver millions of viewers in one shot."

Newsweek

9/12/94

"And even with all the audience fragmentation of today, the biggest concentration of TV rating points still rests with a handful of players, primarily ABC, CBS and NBC... These audiences outweigh the combined viewership of all other TV sources, including cable, independent TV stations and public TV."

Joe Mandese

Advertising Age

Spring 1995



TOP 20 PROGRAMS

The three networks have 19 of the 20 highest rated regularly scheduled programs

<u>RANK</u>	<u>PROGRAM</u>	<u>ORIG</u>	<u>AVG</u>
			<u>HH RATING</u>
1	Home Improvement	ABC	20.0
2	Grace Under Fire	ABC	19.3
3	Seinfeld	NBC	18.9
4	ER	NBC	18.2
5	60 Minutes	CBS	18.2
6	Monday Night Football	ABC	17.7
7	NYPD Blue	ABC	17.0
8	Roseanne	ABC	16.5
9	Murder, She Wrote	CBS	16.1
10	Ellen	ABC	14.9
11	CBS Sunday Movie	CBS	14.8
12	Frasier	NBC	14.7
13	Mad About You	NBC	14.3
14	Murphy Brown	CBS	14.2
15	Madman of the People	NBC	14.0
16	Wheel of Fortune	SYND	13.9
17	Friends	NBC	13.6
18	Dave's World	CBS	13.5
19	20/20	ABC	13.5
20	NBC Monday Movie	NBC	13.4

Source: NTI, NSS; 4th Quarter 1994 Ranking Report

TOP 50 PROGRAMS

Regardless of the age target, the 3 Nets dominate the top 50 programs.

	ABC,CBS,NBC	FOX	Syndication	Cable
Total HH	45	3	2	0
Adults 18+	46	2	2	0
Adults 18-34	35	14	1	0
Adults 18-49	41	9	0	0
Adults 25-54	43	7	0	0

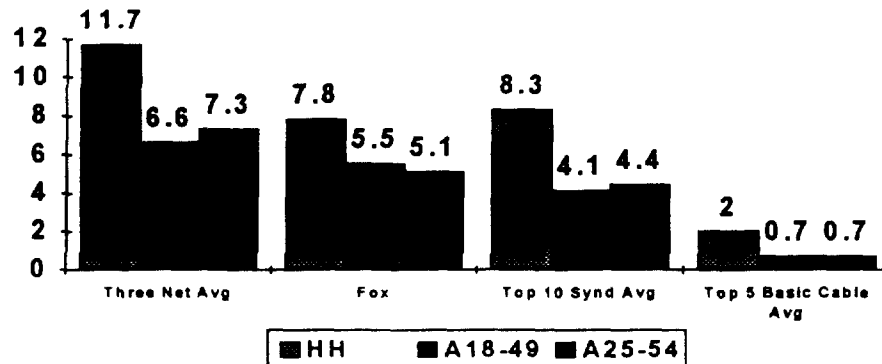
Source: NTI, NSS; 4th Quarter 1994 Ranking Report



THE NETS LEAD ALL COMPETITORS

Despite the greatly increased competitive environment, ABC, CBS and NBC still command the majority of the nation's viewing audience on any given evening. The average primetime show on the 3 Nets beats Fox, the average of the top 10 syndicated shows and the average of the top 5 cable networks

Average Ratings

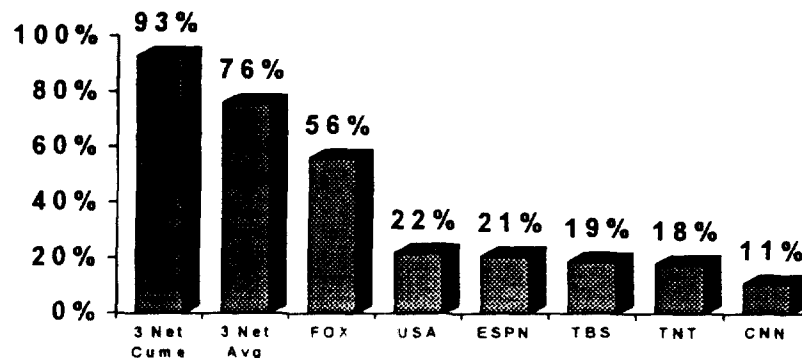


Source: NTI, NSI Season to Date 9/5/94-2/5/95, CNAD 4th Qtr 1994. Syndicated Programs: Wheel of Fortune, Jeopardy, Oprah Winfrey, Ent Tonight, Star Trek: Deep Space Nine, Roseanne, Baywatch, Hard Copy, Inside Edition, Married w/ Children. Cable Networks: ESPN, TBS, TNT, USA, NICK

TOTAL PRIMETIME WEEKLY CUME

Each of the three networks reach an average of 76% of the TV households in Primetime. Together they reach 93% of all homes. The cable networks are all below 25%.

Total Primetime Weekly Cume



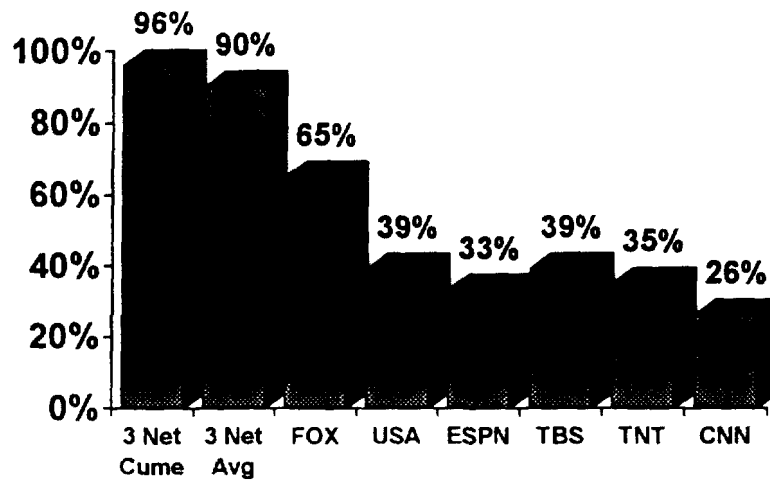
Source: NCAR 4th Quarter 1994



TOTAL 24 HOUR WEEKLY CUME

On a twenty-four hour basis, ABC, CBS and NBC reach 96% of all U.S. households. Individually each reaches 90% of households. At best, cable reaches only 39% of households.

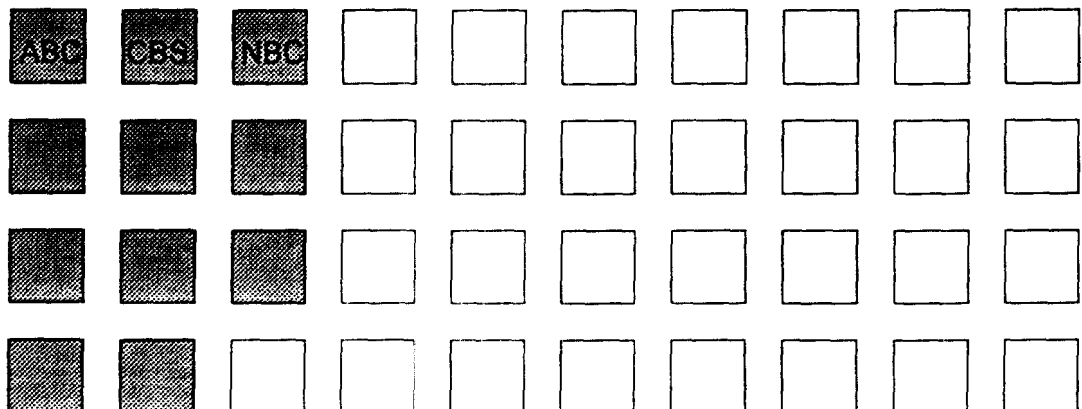
Total 24 Hour Weekly Cume



Source: NCAR 4th Quarter 1994.

CHANNELS VIEWED

The average household does not tune to the vast majority of viewing options available to it during the course of a week. Of 40 channels, only 11 are viewed. ABC, CBS and NBC are three of those 11.

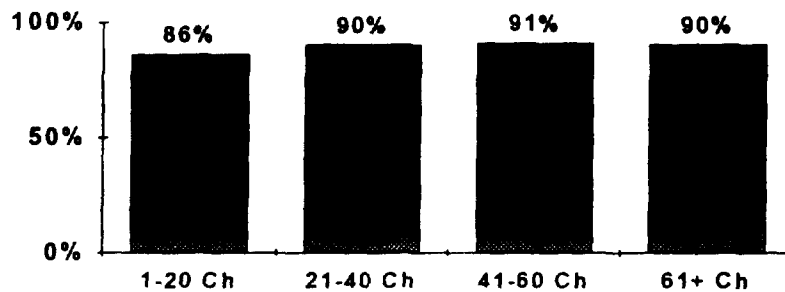


Source: Nielsen Channels Viewed vs. Received 1995.

NETS MAINTAIN REACH IN 61+ CHANNEL UNIVERSE

The 3 Networks maintain their reach levels even in the 61+ channel universe.

3 Net Weekly Cume Reach vs. Channels Received

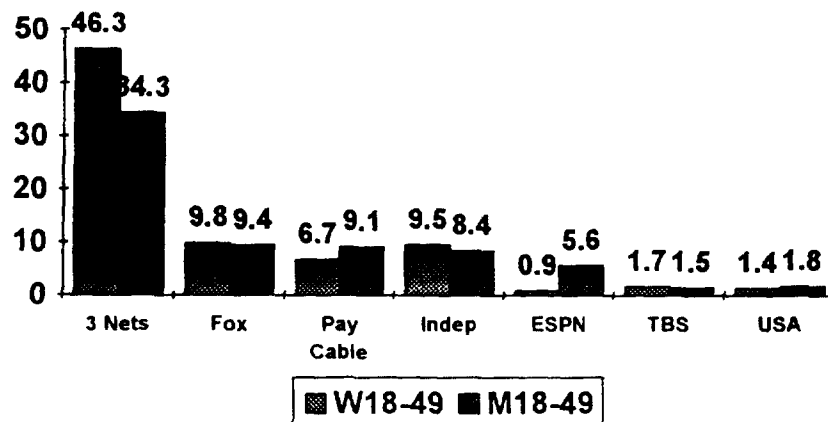


Source: 1995 Nielsen Channels Viewed vs. Received

NETS DOMINATE IN 71+ CHANNEL UNIVERSE

The 3 nets are consistently the dominant choice, even in homes with 71+ channels.

Share of Minutes in 71+ Channel Homes



Source: 1995 Nielsen Channels Viewed vs. Received

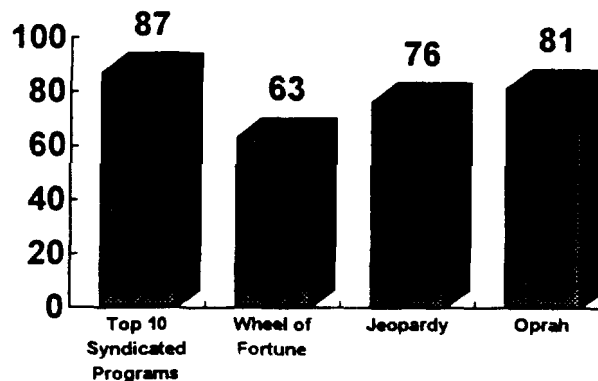


DELIVERING UPSCALE AUDIENCES

Upscale audiences are difficult to target. Only the nets can give both the composition and coverage an advertiser needs.

- 1) Composition for the top rated syndicated programs indexes below average for households with incomes over \$60M+.

Syndication Upscale Composition Indices Households with HHI \$60M+



Source: SNAD November 1994. Top 10 Syndicated Programs based on HH Ratings.

- 2) While some cable nets do a good job of targeting upscale households, cable does not reach many of them.

Upscale Compositions And Rating Top 5 Cable Networks

<u>Program Source</u>	<u>HHI\$60M+</u>	
	<u>Comp</u>	<u>RTG</u>
Comedy Channel	196	0.2
Learning Channel	164	0.2
Headline News	149	0.3
ESPN	142	2.5
VH1	133	0.2

Source: CNAD 4th Quarter 1994. Top 5 Cable Networks based on composition of HHI\$60M+ demo.



3) The 3 Nets can target upscale households and also reach large numbers of them.

Upscale Compositions And Ratings

Three Networks Primetime

<u>Program Source</u>	HHI\$60M+	
	<u>Comp</u>	<u>RTG</u>
Top 40 Prime Avg	110	15.7
Total Prime Avg	103	12.4
ER	130	24.1
Frasier	144	22.6
Grace Under Fire	121	22.8
Murphy Brown	126	19.1
Northern Exposure	121	15.3
NYPD Blue	145	27.2

Source: NAD 4th Quarter 1994 Top Programs based on HH Ratings.

4) The ability of the Nets to target upscale demographics extends beyond primetime into other dayparts, sports and specials.

Upscale Composition And Rating

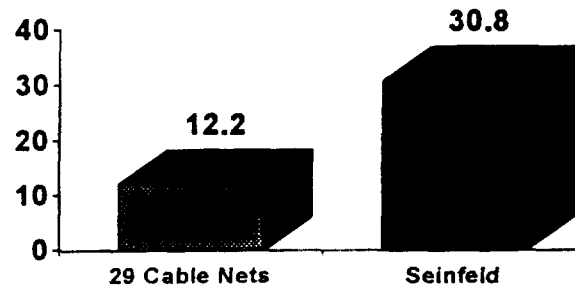
Other Dayparts and Specials

<u>Program Source</u>	HHI\$60M+	
	<u>Comp</u>	<u>RTG</u>
Late Show/Letterman	111	6.2
Saturday Night Live	151	10.4
Good Morning America	111	4.9
Academy Awards	138	43.0
Masters Golf	158	12.8
NBA Finals	140	25.1
Orange Bowl	148	28.0
Super Bowl XXVII	125	56.7
World Cup Soccer	175	11.9
XVII Winter Olympics	125	60.7

Source: NAD 4th Quarter 1994

5) One spot on Seinfeld buys almost three times the ratings points of a roadblock of all 29 cable networks currently measured by Nielsen

One Spot on Network TV vs. All 29 Cable Networks
HHI \$60M+ Rating Points

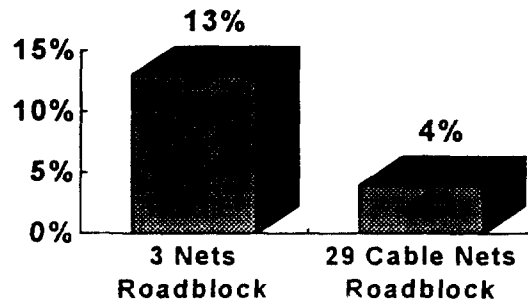


Source: NTI Cume Reach Facility Week of 10/31/94-11/6/94

REACHING THE LIGHT VIEWER

Cable's claimed strength in reaching the light viewer is overshadowed by the 3 nets. In an average Primetime minute, the reach of the nets against the light viewer is three times greater than a roadblock on 29 cable nets.

Reaching the Light Viewer
During an Average Primetime Minute



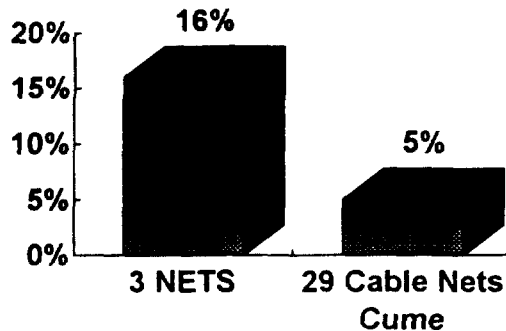
Source: NTI Cume Reach Facility 10/31/94-11/6/94



REACHING YOUNG VIEWERS

Young adults are generally difficult to reach through any medium. ABC, CBS and NBC reach more Adults 18-34 in Primetime than a roadblock of 29 cable networks.

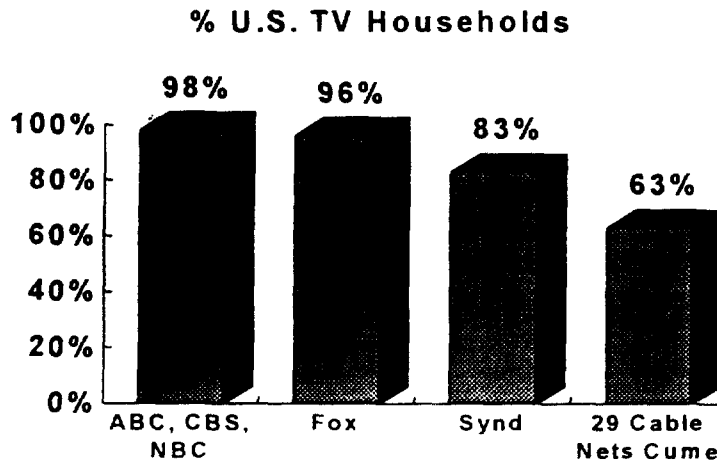
**Reaching Adults 18-34
During an Average Primetime Minute**



Source: NTI Cume Reach Facility 10/31/94-11/6/94

COVERAGE

ABC, CBS and NBC cover virtually the entire United States. They each reach 98% of all U.S. Households, Fox reaches 96%, syndication on average reaches only 83% and the whole of cable reaches only 63% of TV Households.



Source: Nielsen TV Audiences 1995



CABLE PENETRATION

Though the average U.S. cable penetration is 63%, market by market penetration varies dramatically. In Dallas and Minneapolis, a cable buy denies access to over 50% of TVHHs. At best, cable misses 24% of TVHHs in Pittsburgh, which has the highest cable penetration among the top 20 markets.

% of TV Households Not Covered by Cable in the Top 20 Markets

Top 1-10		Top 11-20	
<u>Markets</u>	<u>% TVHHs</u>	<u>Markets</u>	<u>% TVHHs</u>
New York	34.4%	Houston	46.8%
Los Angeles	40.5%	Seattle	31.1%
Chicago	43.8%	Cleveland	34.7%
Philadelphia	27.4%	Minneapolis	52.0%
San Francisco	32.2%	Tampa	31.2%
Boston	25.3%	Miami	33.3%
Washington D.C.	35.6%	Pittsburgh	24.1%
Dallas	50.9%	Denver	41.9%
Detroit	36.5%	Phoenix	46.2%
Atlanta	37.7%	St. Louis	49.8%

Source: NTI 1995

OTHER CABLE PENETRATION FACTS

- Almost half of the 29 cable networks measured by Nielsen have a household coverage level under 50%.
- Less than 1/3 of cable networks provide close to the 63% average cable penetration.
- Only 56% of all sets are actually wired for cable since many second sets in homes are not wired.

Source: Nielsen Media Research 1995

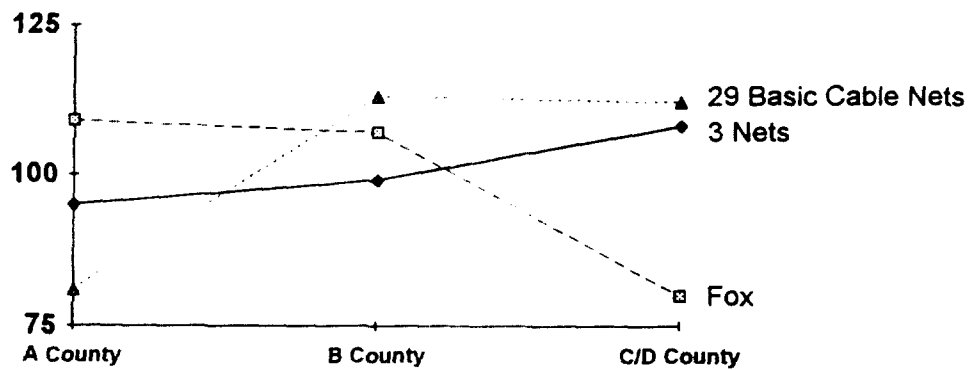


VIEWERSHIP BY COUNTY SIZE

Nets/Cable/Fox

Network television provides balanced delivery to both urban and rural areas. Cable skews to B, and C/D counties. Fox, on the other hand, underdelivers C/D counties.

The Nets Effectively Deliver All Counties (Index to Population)



	A County	B County	C/D County
3 Nets	95	99	108
Fox	109	107	80
29 Basic Cable Nets	81	113	112
CNN	84	113	106
ESPN	80	116	108
TBS	80	106	119
TNN	45	112	166
TNT	85	110	109
USA	86	109	112

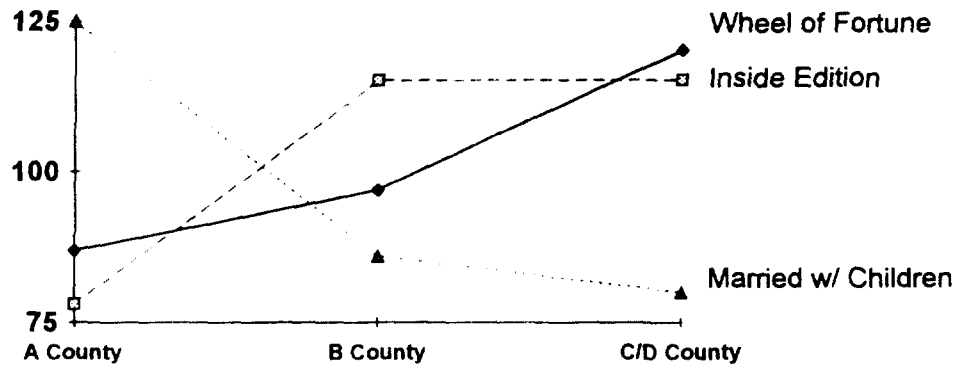
Source: NTI NAD November 1994, CNAD4th Quarter 1994.

SYNDICATION'S COUNTY SIZE AUDIENCES VARY

Syndication

Syndicated programs show wide variations in delivery by county size.

**Syndication Varies By County
(Index to Population)**



<u>Top 10 Syndicated Programs</u>	<u>A County</u>	<u>B County</u>	<u>C/D County</u>
1) Wheel of Fortune	87	97	120
2) Jeopardy	97	98	104
3) Oprah Winfrey	98	95	107
4) Entertainment Tonight	110	92	94
5) Star Trek: Deep Space Nine	95	106	81
6) Roseanne	91	104	109
7) Baywatch	109	92	95
8) Hard Copy	101	93	103
9) Inside Edition	78	115	115
10) Married With Children	125	86	80

Source: Nov 1994 SNAD. Wheel of Fortune Weekday numbers only.

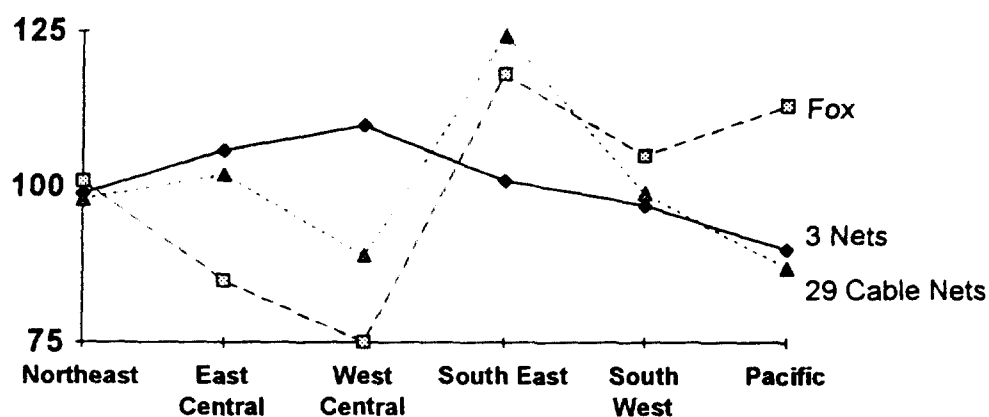


VIEWERSHIP BY GEOGRAPHIC REGION

Nets/Cable/Fox

Network television also provides balanced delivery on a geographic basis. Cable and Fox show substantial variation.

**The Nets Provide Regional Balance
(Index to Population)**



	NE	EC	WC	SE	SW	Pac
3 Nets	99	106	110	101	97	90
Fox	101	85	75	118	105	113
29 Cable Nets	98	102	89	124	99	87
CNN	129	117	86	105	76	76
ESPN	88	101	85	132	100	93
TBS	83	106	89	124	99	87
TNN	56	98	147	151	131	40
TNT	98	103	85	111	105	99
USA	108	102	88	112	84	96

Source: 4th Quarter 1994 CNAD, Nov 1994 NAD..

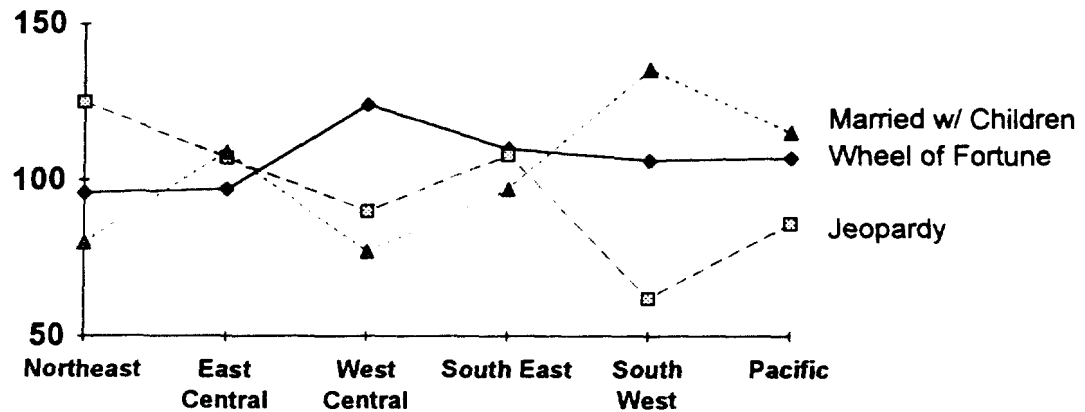


SYNDICATION GEOGRAPHIC REGIONS

Syndication

Syndication varies widely in geographic delivery from program to program.

**Syndication Regional Audiences
(Index to Population)**



Top 10 Synd Programs	NE	EC	WC	SE	SW	Pac
1) Wheel of Fortune	96	97	124	110	106	107
2) Jeopardy	125	107	90	108	62	86
3) Oprah Winfrey	100	104	107	107	91	86
4) Ent. Tonight	107	109	85	109	81	98
5) Star Trek: Deep Space	92	87	91	102	78	107
6) Roseanne	110	108	109	93	104	80
7) Baywatch	109	93	97	115	78	93
8) Hard Copy	93	103	84	125	85	100
9) Inside Edition	99	118	113	125	72	68
10) Married w/ Children	80	109	77	97	135	115

Source: NTI SNAD November 1994 Wheel of Fortune Weekday numbers only.



QUALITATIVE MEASUREMENTS

Not all rating points are equal.

In addition to audience size and composition, three environmental factors are critical to an advertising message's effectiveness. These factors are:

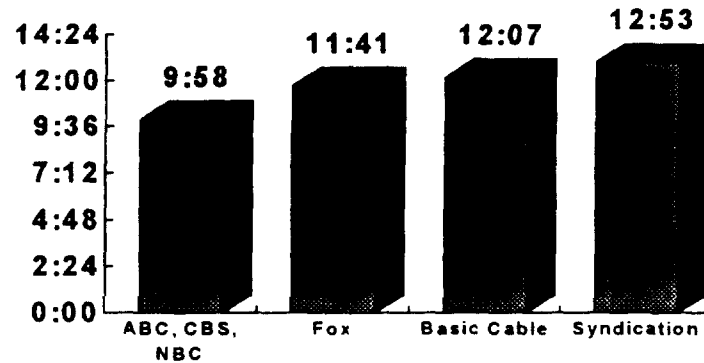
- 1 Amount of advertising clutter - Commercialization
- 2 Commitment of Viewers to Programming - Loyalty
- 3 Audience stability - Holding Power

Of all the national television media, ABC, CBS and NBC provide the best environment for advertisers. There are fewer commercials. In addition viewers of the 3 Nets watch programs longer, and return to view the same programs week after week. This viewer involvement provides enhanced value to advertisers: network television viewers are more likely to be exposed and receptive of commercial messages.

COMMERCIALIZATION

The networks have fewer commercial minutes than Fox, syndication and cable networks.

Commercial Minutes Per Hour

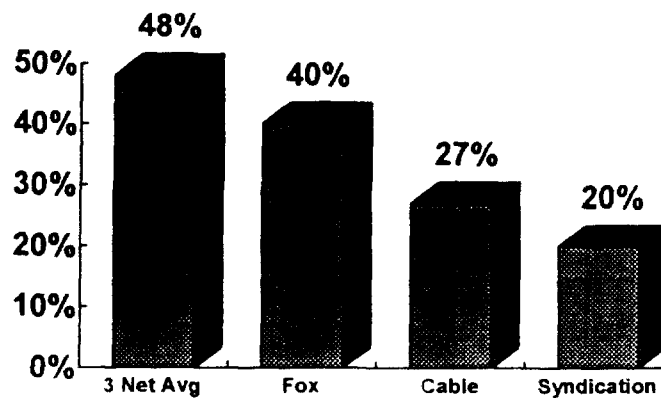


Source: ANA/AAAA Commercial Monitoring Report, May 1994.

VIEWER LOYALTY

The Three Networks' regular programming attracts far more repeat viewing than options.

**% Adults 18+ Watching
Two Weeks in a Row**

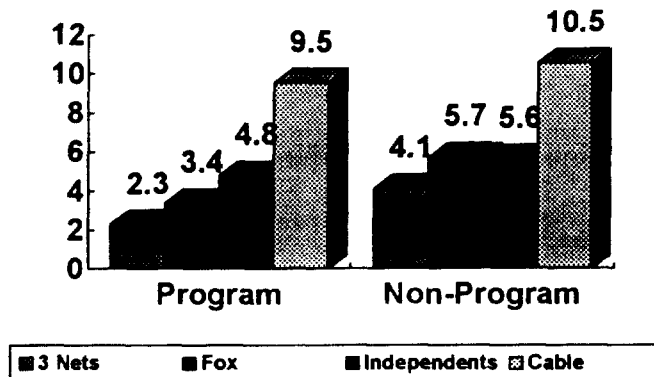


Source: Nielsen Cume Facility Oct 1994. Regularly scheduled weekly programming.

DIAL SWITCHING

Homes tuned to ABC, CBS and NBC are less prone to dial switching than those tuned to Fox, independents or cable.

**Tune In or Out per :30 Second Interval
Primetime Household Audiences**

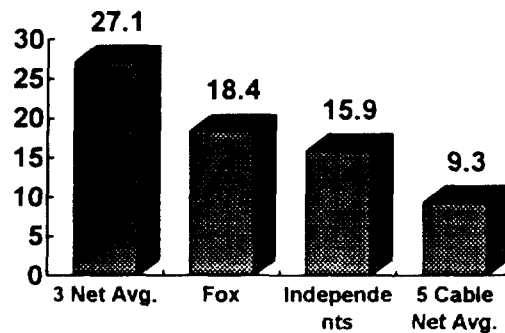


Source: Nielsen Study 11/11/90-11/18/90

HOLDING POWER

Network programming holds viewers longer than Fox, independents or cable. The average network's primetime audience stays tuned for nearly one half-hour before moving on to their next viewing selection.

**Average Primetime Tuning Duration
of Minutes**

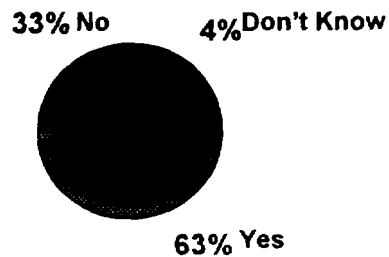


Source: Television Retention Study, Nov. 1990 Cable: CNN, ESPN, FAM, USA, TBS.

APPOINTMENT VIEWING

Viewers are committed to television programming. They not only watch the programs that are offered when they turn on the TV, but a majority also make appointments to view television programming.

Programs You Make an Appointment to Watch

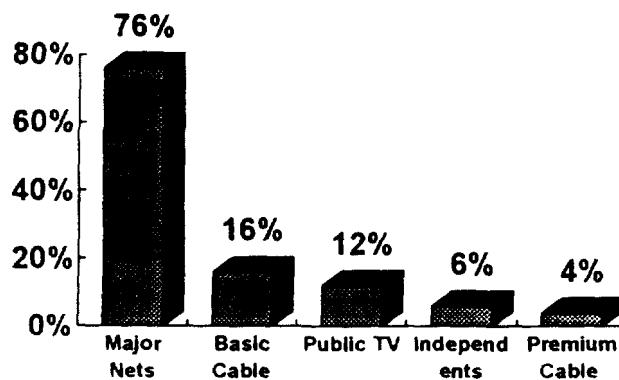


Source: 1995 Roper Study

APPOINTMENT VIEWING MOST OFTEN OCCURS ON NETWORK TV

Among "appointment viewers", an overwhelming 76% mention network television when asked which kind of television has the most programs they make a special effort to watch

Where "Appointment Viewing" Most Often Occurs

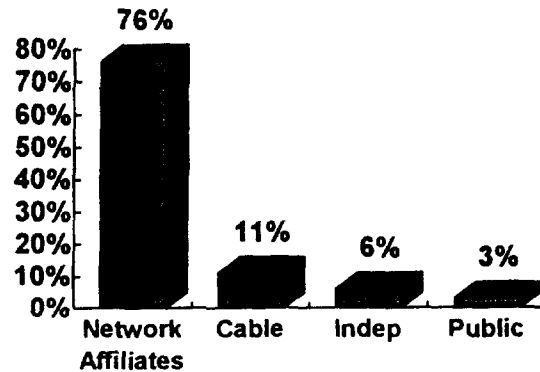


Source: 1995 Roper Study

VCR RECORDING

When asked what people record most, the overwhelming majority record network tv programming.

Where Most VCR Recording Takes Place

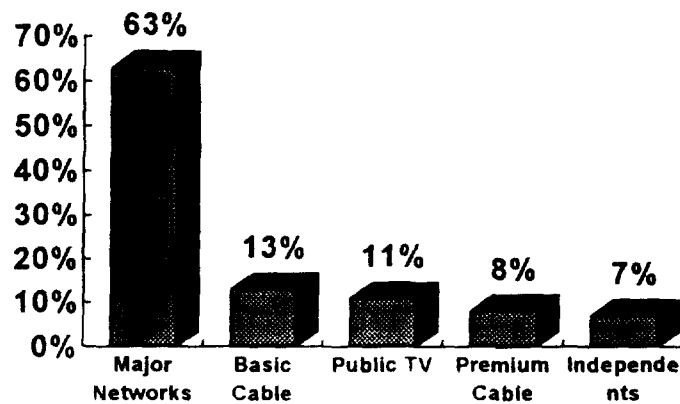


Source: Nielsen VCR Tracking Report, May 1994. Nets include Fox.

FAMILY VIEWING

Network television is the medium of choice for family viewing. When asked which kind of television they last watched as a family, 63% of parents mention network television

What Families are Watching Together

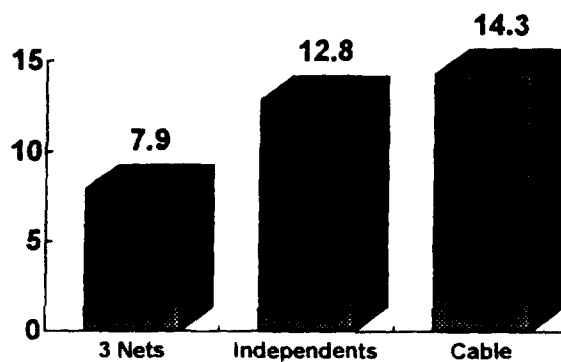


Source: 1995 Roper Study.

ZAPPING

Commercials on the 3 Nets are least likely to be zapped. Zapping levels are considerably higher for independent stations and cable networks.

**% Loss in Average Primetime Minute Ratings
In-Program vs. Commercial**



Source: Media Dynamics compiled from Backer Spielvogel Bates Sept 1992 Arbitron Study

The Nets' Net: A Network Primer

"With all the fuss over new media, never underestimate the staying power of good old network television."

Advertising Age

"We simply cannot afford to lose our focus on preserving direct-broadcast television as the primary vehicle for advertising messages."

Edwin Artzt

Procter & Gamble

"Broadcast networks are the hottest media properties around."

Adweek



WHAT IS A NETWORK?

A network is a system of programming and advertising distribution that provides:

- 1) **Ubiquitous national coverage**
- 2) **A consistent line-up of stations**
- 3) **Uniformity in terms of the day, daypart and time of day**
- 4) **Consistent broadcast standards and practices**
- 5) **Timely accountability to advertisers in the form of electronic audience and station clearance verification.**

According to FCC Rules, a true network broadcasts over 15 hours of primetime programming per week. ABC, CBS and NBC are the only true networks. Each maintains programming during all hours of primetime. Only the Nets provide the opportunity to simultaneously advertise nationwide.

In comparison, Fox is not a true network and does not need to conform to many FCC Regulations since it does not broadcast over 15 hours of primetime programming. The same holds true for the emerging networks: Warner Brothers and United Paramount.

Syndicators offer neither daypart or station uniformity. Some syndicators will try to focus on a narrow time period, and promote themselves as airing uniformly, but an actual look at clearances tells a different story. For example; *Star Trek: Deep Space Nine*, which is billed as a primetime show, runs 81% in primetime, 7% in late night, 7% in early evening, and the rest is scattered across other dayparts. *Renegade* only runs 40% in primetime.

Syndicators do not achieve the % U.S. TV HH Coverage provided by the networks. Network programs, on average, have 98-99% U.S. coverage. Syndication, on average, covers 83%.



THE NEW NETWORKS

Time Warner and Paramount, both with production arms, believe that changes in the fin/syn rules will lead to increased program production by the networks. As a result, there will be less space on station schedules for their programs. Therefore, they have developed their own networks hoping to ensure access for their programming.

WARNER BROTHERS NETWORK

The Warner Brothers network debuted January 11, 1995. Its initial cornerstone is seven stations owned by the Tribune Company. It currently runs two hours of shows over one night (Wednesday) per week. It targets 12-34.

WB's programming is available in only about 78% of the country on over-the-air stations as well as on Superstation WGN. In addition to the 3% national coverage represented by WGN-TV's own Chicago broadcast coverage, the station provides another 18% of WB's coverage via satellite delivery to cable systems across the country. Despite WB's emphasis on airing programming on a regular schedule in all markets their lineup can and was delayed due to WGN's commitments to televise Chicago Bulls basketball games.

WB's arrangements with its affiliates is a policy of reverse compensation based on stations improving their time period ratings. WB will take a percentage of the profits as well as revenue from national ad sales.

UNITED PARAMOUNT NETWORK

UPN (United Paramount Network) debuted January 16. It is presenting four hours of original programming over two nights (Monday and Tuesday). Its cornerstone is a new Star Trek spin-off. UPN targets Men 18-49. While "Star Trek: Voyager", has 98% national coverage, other UPN programming is only available in 83% of the country. Nearly one-third of the stations will air the programs out of pattern. The affiliates pay no fees to receive their programming. UPN will make its money from revenue generated from national advertising time and local spots

